

**South Carolina**  
Commission on Higher Education  
*Access | Affordability | Excellence*

# CHE Agency Overview

Rusty Monhollon, Ph.D.

President and Executive Director

# Commission on Higher Education Senior Leadership Team

- Ms. Laura Belcher, Senior Advisor to the President and Executive Director
- Dr. Mariam Dittman, Director, Office of Academic Affairs and Licensing
- Ms. Monica Goodwin, Director, Office of Data and Information Technology
- Mr. Georges Tippens, Deputy Director and General Counsel
- Ms. Bunnie Ward, Director, Office of Strategic Initiatives and Engagement
- Mr. Bryce Wilson, Director, Office of Fiscal Affairs
- Dr. Karen Woodfaulk, Director, Office of Student Affairs



# Agency Purpose, Vision and Mission

- SC Code of Laws, primarily Title 59, Chapter 103
- Mission of higher education in South Carolina (59-103-15)
  - global leader
  - *coordinated, comprehensive system of excellence*
  - instruction, research, and life-long learning opportunities
  - focused on economic development and benefitting the state
- Goals include:
  - high academic quality
  - affordable and accessible education
  - instructional excellence
  - coordination and cooperation with public education
  - cooperation among various constituents
  - economic growth
- System of excellence, statewide perspective

# Higher Education in South Carolina

- Multi-billion dollar enterprise
- 150 plus institutions: public, private, for-profit
- Range both in size and mission, rural and urban
- Big and complex; a challenging undertaking
  - Public four-year institutions 13
  - Public Technical Colleges 16
  - Other public two-year institutions 4
  - Independent institutions 25
  - For-profit four-year institutions 3
  - Other licensed institutions 97

# Agency Purpose, Vision and Mission (continued)

- Ensure system is accessible, affordable, and has excellent programs
- Reduce unnecessary duplication, increase effectiveness, achieve economies of scale, eliminate friction
- Maintain a statewide planning system
- Identify future directions and recommend solutions to challenges
- Specific statutory responsibilities of the CHE include:
  - review and approval of new academic degree programs
  - administration and oversight of state financial aid programs
  - review and recommend all new capital projects
  - data management and reporting data

# Agency Purpose, Vision and Mission (continued)

- Focus on long-term strategic issues, such as:
  - accessibility and affordability
  - ensure the system is producing postsecondary credentials the state needs
  - seek new ways to help more students succeed
  - explore opportunities for greater efficiency
  - assess if resources and policies are consistent with goals
- Our effectiveness depends on:
  - adequacy of resources
  - quality of our analysis and information
  - relationships with stakeholders

# Agency History

- Peabody Report (1946): recommend a higher education commission to *“develop and maintain an adequate, efficient, and progressive system of coordinated higher education in keeping with the needs of the State.”*
- Recommended responsibilities:
  - prepare annual budget for all institutions
  - create uniform procedures
  - integrate each institution into the system
  - receive access to the institutions and their records
  - use their professional personnel in continuing research studies
  - *“..to do whatever else is necessary to develop and maintain an adequate, efficient, and progressive system of coordinated higher education in keeping with the needs of the State.”*

# Agency History (continued)

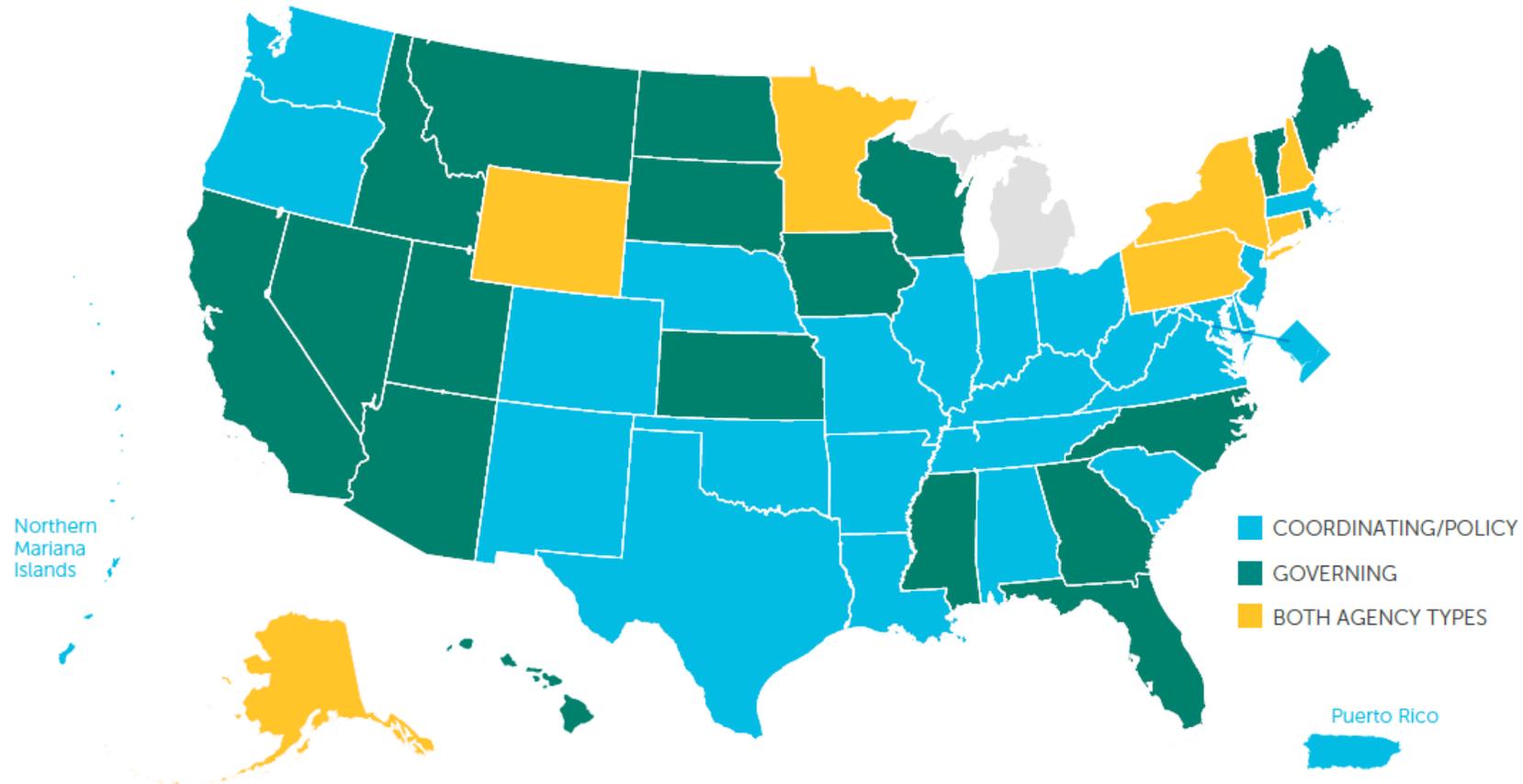
- Act 811 (1962): Advisory Commission on Higher Education (ACHE)
- Strictly advisory; no authority
  - meet regularly
  - study planning, trends, costs, management practices, capital funding, curricula
  - reduce duplication, improve effectiveness, eliminate misunderstandings
  - promote greater unity and good will among all institutions
  - serve educational needs of South Carolinians on statewide level
- Council of Presidents
  - meet quarterly, twice with ACHE
  - report on planning, business & financial coordination, library utilization
- ACHE to advise Budget and Control Board
- *“Nothing in this act shall be construed as clothing the Commission with any apparent or inherent powers except those of an advisory nature.”*

# Agency History (continued)

- Act 194 (1967) creates the Commission on Higher Education (CHE)
- CHE provided with authority
  - Academic program approval
  - Institutional budget review and recommendations
  - Recommendations on policies, programs, facilities, administration, financing
  - Study requests for new or additional appropriations for operations and programs
  - Report on state of higher education in SC, with recommendations as appropriate
- Some of this authority and responsibility remains

# Agency History: Single, Statewide Coordinating Board/Agency Explanation

FIGURE 1  
SHEEO MEMBER GOVERNING AND COORDINATING/POLICY BOARDS, FY 2021



# Postsecondary Governance Models

- Single, Statewide Coordinating Board/Agency
  - Responsible for aspects of state's role with public postsecondary institutions and, in some cases, with independent colleges.
- Single, Statewide Governing Board:
  - Manages and oversees most functions of the public higher education system; typically has broad authority over institutions.

*Source: ECS, An Analysis of State Postsecondary Governance Structures*

# Agency History: Significant Events Timeline

- 1969 CHE-Institution Data Collection Agreement
- 1970 Goals for the Seventies Plan
- 1970 Participation in the Southern Regional Education Board's (SREB) Education Reciprocity Programs
- 1970 SC Defense Scholarship Fund
- 1971 Collection of five-year institutional capital improvement plans (pre-cursor of the CPIP)
- 1972 Creation of the State Board for Technical and Comprehensive Education
- 1972 First Transfer and Articulation Committee and Study



# Agency History (continued)

- 1973 Statewide criteria for admission to associate of arts and associate of science degrees; approval of associate of applied science degrees
- 1974 Addition of SREB's Academic Common Market
- 1974 SC Student Loan Corporation chartered
- 1975 Approval of degree program approval process, incorporating new committees: CAAL and ACAP
- 1976 Statewide higher education computer network established
- 1977 Authority to license non-public degree-granting institutions



# Agency History (continued)

- 1979 SC Master Plan for Higher Education
- 1979 First edition of Higher Education Statistical Abstract
- 1981 Desegregation Noncompliance
- 1981 SC Five Year Plan for Equity and Equal Opportunity in the Public Colleges and Universities
- 1981 First Associate Degree Evaluation Report
- 1981 Approval of external program review by discipline initiative
- 1983 Approval of high school course pre-requisite requirements

# Agency History (continued)

- 1983 Agreement to bring all campus facilities to at least satisfactory standard
- 1984 Promotion of Advanced Placement Courses accepted at institutions for credit
- 1984 Education Improvement Act Centers of (Teaching) Excellence grant awards
- 1986 Final comprehensive report on implementation of the SC Higher Education Desegregation Plan
- 1986 SC Three Year Desegregation Plan
- 1987 “The Cutting Edge: Higher Education’s Initiatives for Research and Academic Excellence in SC” Report

# Agency History (continued)

- 1988 The Cutting Edge, Act 629
- 1988 Palmetto Fellows Scholarship
- FY1989 Establishment of SC Program for Recruitment and Retention of Minority Teachers (SC-PRRMT)
- FY1989 Institutional Effectiveness guidelines
- FY1989 Higher Education Program for Access and Equity
- FY1990 Federal Eisenhower Teaching Excellence Grant Awards
- FY1990 First Institutional Effectiveness Report
- FY1990 Adoption of agency mission statement

# Agency History (continued)

- FY1991 Establishment of Higher Education Awareness Program (HEAP)
- FY1991 Authority to license non-public, non-degree granting institutions
- FY1992 Designation of State Approving Agency (SAA) for Veteran's Education
- FY1993 Creation of Library Directors' Forum (PASCAL precursor)
- FY1993 National recognition of SC institutional effectiveness program
- FY1993 First Biennial Program Productivity Report

# Agency History (continued)

- FY1993 Designation as state coordinating agency for the Integrated Postsecondary Education Data System (IPEDS)
- FY1993 Implementation of the CHE Management Information System (CHEMIS)
- FY1994 School-to-Work (Act 450) articulation initiatives
- FY1994 Task Force to study additional funding for higher education based on quality
- FY1995 Act 137 Commission membership changes; role of Executive Director codified



# Agency History (continued)

- FY1995 Developmental coursework placed at two-year institutions
- FY1995 Troops to Teachers initiative
- FY1996 Act 359, Performance Funding
- FY1996 Establishment of Need-Based Grants Program (SC Children First Act 458)
- FY1998 Legislative Incentives for Future Excellence (LIFE) Scholarship
- FY1999 First Gaining Early Awareness and Readiness for Undergraduate Programs (GEARUP) multi-year federal grant

# Agency History (continued)

- FY1999 First annual campus safety conference
- FY2000 Regulations for scholarship appeals process
- FY2001 Creation of PASCAL academic library consortium
- FY2001 Authority for SC National Guard Loan Repayment program
- FY2001 Funding for Performance Funding ended
- FY2001 Revised agency mission and vision statement
- FY2002 Lottery Tuition Assistance Program (LTAP) and SC HOPE scholarships (Act 496, Education Lottery)

# Agency History (continued)

- FY2002 SmartState (Research Centers of Economic Excellence) public-private research grant awards
- FY2003 Establishment of the Higher Education Excellence Enhancement Program (HEEEP)
- FY2003 CHE-PASCAL Memorandum of Understanding
- FY2003 H3899, Breakaway Bill consideration
- FY2004 Foundations for the Future: Higher Education in SC Report
- FY2005 Education and Economic Development Act (EEDA)

# Agency History (continued)

- FY2006 Second GEARUP multi-year federal grant
- FY2006 Governor's Task Force on Higher Education
- FY2007 SC National Guard Tuition Assistance program replaced Loan Repayment program
- FY2007 STEM enhancements to LIFE and Palmetto Fellows Scholarships
- FY2007 Establishment of the Course Alignment Project (EEDA)
- FY2008 Establishment of the Higher Education Study Committee
- FY2008 Critical Needs Nursing Initiatives Act 276



# Agency History (continued)

- FY2009 Higher Education Study Committee Action Plan
- FY2009 Recognition of SmartState as best of its kind in nation
- FY2009 Great Recession (from FY08-FY11, 43% cumulative loss in funding)
- FY2009 Suspension of data reports per proviso
- FY2010 Received College Access Challenge Grant
- FY2010 SC Transfer and Articulation Center (SCTRAC) portal active
- FY2010 SC CAN GO website and media campaign

# Agency History (continued)

- FY2011 Funding loss for Access and Equity; Nursing initiative; HEAP
- FY2012 Third GEARUP multi-year federal grant
- FY2014 College Transition Program Need-Based Grant
- FY2016 SC State Authorization Reciprocity Agreement (SC-SARA), Act 146
- FY2016 Higher Education Governance ad hoc Committee of House Education and Public Works Committee
- FY2016 Tucker Hipps Transparency Act
- FY2016 Project Pipeline Repair Partnership
- FY2018 Public Agenda for Higher Education



# *Ascend 60x30* Public Agenda for Higher Education in SC



# ***Ascend 60x30***

## **Public Agenda for Higher Education in SC**

**Goal:** By 2030, 60 percent of South Carolinians will hold a high-quality postsecondary credential, and all achievement gaps will be reduced by at least 75 percent.

- 60% or more of new jobs require postsecondary education/training

### **Priorities:**

- Enhance Access and Affordability
- Ensure Student Success
- Strengthen the State's Workforce

# ***Ascend 60x30***

## **Public Agenda for Higher Education in SC**

- Why focus on greater educational attainment?
  - Remain competitive in global economy
  - Knowledge-based economy demands greater skills/knowledge
  - More training/education equates to greater lifetime earnings
  - Minimize impact of economic changes
  - The key to economic growth and building a better society
  - Reduced social costs
  - Close “attainment gaps”

# *Ascend 60x30*

## **Public Agenda for Higher Education in SC**

- Primarily has been a regulatory agency
- Needs of state have changed; higher education has changed; CHE must also change
- Shift focus to “benefit the State of South Carolina”
- Reorient approach to our work and goal attainment

# Counterparts

## Federal

- United States Department of Education, Office of Postsecondary Education (OPE)
- United States Department of Education, Office of Federal Student Aid

## Local

- Four-year public institutions' Boards of Trustees
- Technical College Area Commissions

# Agency Head Qualifications, Duties, and Background

- § 59-103-90: Manage and carry out duties of Commission; ensure staff has professional competence and experience
- Commission appoints agency head to manage and carry out duties as prescribed by law and assigned by the Commission
- Minimum qualifications: bachelor's degree; significant experience
- Preferred qualifications: graduate degree and experience with SC state government

# Agency Head Qualifications, Duties, and Background (continued)

- Professional administrator and executive secretary of CHE
- Advise on all educational matters, recommend policies and implement procedures, direct operations of the CHE office
- Keep minutes of all Commission meetings
- Recommend staff organization and manage daily operations
- Hire staff for all positions
- Represent the CHE in groups, bodies, agencies, organizations
- Perform other duties as assigned

# Agency Head Tenures

Name	Title	Dates of Tenure	Tenure (years)
Frank E. Kinard, Ph.D.	Executive Director	1967-1968	1.00
James A. Morris, Ph.D.	Commissioner	1969-1972	5.00
Vacant		1972-1973	1.00
Howard R. Boozer, Ph.D.	Executive Director	1974-1986	13.00
Charles A. Brooks, Jr.	Interim Executive Director	1985-1986	1.00
Fred R. Sheheen	Commissioner	1986-1997	10.00
Rayburn Barton, Ph.D.	Executive Director	1997-2002	5.50
John Smalls	Executive Director	2003	1.75
Conrad Festa, Ph.D.	Executive Director	2003-2006	2.83
Gail Morrison, Ph.D.	Interim Executive Director	2006-2007	1.00
Garrison Walters, Ph.D.	Executive Director	2007-2012	3.42
Julie Carullo	Interim Executive Director	2012-2013	1.17
Richard Sutton, Ph.D.	Executive Director	2013-2015	2.00
Julie Carullo	Interim Executive Director	2015	0.25
Gary Glenn	Interim Executive Director	2015-2017	1.33
Jeff Schilz	Interim President/Executive Director	2017-2018	1.67
Mike LeFever	Interim President/Executive Director	2018-2019	0.50
Rusty Monhollon, Ph.D.	President and Executive Director	2019-present	3.83

# Agency Head History 1967-present

- 17 administrations; 16 individuals
- Tenure trends:
  - Average tenure: 3.13 years
  - Average tenure 1967-1997: 5.00 years
  - Average tenure since 1997: 2.10 years
  - Average tenure since 2012: 1.54 years
- Seven interim or acting; five since 2012
- Nine with doctorates

# Commission Purpose and Responsibility

- Coordinated, efficient, and responsive higher education system
- Collaborate with Council of Presidents, Council of Board Chairs, business community
- Examine institutions relative to short/long-range programs and missions
  - (a) the role of higher education in serving the needs of the state
  - (b) enrollment trends, costs, management practices, needs, outcomes, funding
  - (c) the administrative setup and curriculum offerings
  - (d) state-level coordination to reduce duplication, increase effectiveness, achieve economies and eliminate sources of friction and misunderstanding;
  - (e) promote better understanding, greater unity and goodwill among institutions.

# Commissioner Appointments

- 15-member board selected per § 59-103-10
- Eight appointed by Governor, with advice and consent of Senate
  - One at-large member, appointed as chair
  - Three statewide, at-large members
  - Three *ex officio*, one each from the board at a public research institution, a four-year public institution, and a technical college
  - One *ex officio non-voting* member, president of an independent college or university
- Seven appointed by the governor upon the recommendation of the legislative delegation from the Congressional district
  - One representative from each of the seven Congressional districts

# Commissioner Qualifications

- Per § 59-103-10
- Seven congressional district positions and four at-large positions
  - Must have experience in business, the education of future leaders and teachers, management, or policy
  - Must not have been a member of a governing body of a public institution in last five years
  - Must not be employed or have immediate family members employed by any of the public colleges or universities

# Commissioner Qualifications (continued)

- Three members representing public colleges and universities should be a member of a Board of Trustees for each public sector (research, four-year, two-year)
- Per statute, the Governor, by his appointments, shall assure that various economic interests and minority groups are fairly represented on the Commission and shall attempt to assure that the graduates of no one public or private college or technical college are dominant on the Commission



# Current Commissioners and Length of Service

Wes Hayes, Chair (5 years)

Doug Snyder (1 year)

Charles Dalton (5 years)

Ben Satcher (5 years)

Terrye Seckinger (9 years)

Dino Teppara (less than 1 year)

Bettie Rose Horne (19 years)

Jenni Bryson (less than 1 year)

Patrick White (4 years)

Cleveland Sellers (4 years)

Edgar Dyer (4 years)

Hubert Mobley (3 years)

Linda Dolny (5 years)

Paul Batson (7 years)

Mark Smith (4 years)

*[No current vacancies as of 5-1-23]*



# Commission Structure and Subcommittees

- Chair appointed by Governor
- Vice-chair elected annually by Commissioners
- Five standing committees:
  - Executive Committee (Chair, Vice-chair, four Committee chairs)
  - Committee on Academic Affairs and Licensing
  - Committee on Access and Equity and Student Services
  - Committee on Finance and Facilities
  - Committee on Strategic Initiatives and Engagement

# Commission Chairs

Name	Dates of Tenure	Length
John Cauthen	April 1967—August 1968	1.33
Robert Vance	September 1968—July 1971	2.83
Craig Hall	August 1971—February 1972	0.50
Smith Cathcart	March 1972—July 1978	6.33
Arthur Swanson	August 1978—February 1980	1.50
James Bostic	February 1980—February 1983	3.00
Fred Sheheen	March 1983—July 1986	3.33
Nelle Taylor	August 1986—November 1988	2.25
William Whitener	December 1988—December 1992	4.00
Glenburn Askins	January 1993—April 1994	1.25
Robert Gallagher	May 1994—July 1994	0.25
Fred Day	August 1994—June 1996	1.83
Austin Gilbert	July 1996—June 2000	3.92
Dalton Floyd	July 2000—April 2005	4.92
Layton McCurdy	May 2004—June 2008	4.08
Ken Wingate	December 2008—August 2012	3.33
John Finan	August 2012—September 2015	3.08
Tim Hofferth	September 2015—October 2018	3.08
Wes Hayes	November 2018—present	4.42



# Commissioner Training: Orientation

- New Commissioners are provided with a handbook and a three-hour orientation with CHE leadership
- Once assigned a committee, new Commissioners typically receive an informal orientation by the related office director and the committee chair

# Commission Training: Annual

- Agency Head Salary Commission Training
- Annual retreat speaker examples:
  - Moody's Investors Service
  - National Center for Higher Education Management Systems (NCHEMS)
  - Southern Association of Colleges and Schools Commission on Colleges
  - Governor's Office (SACSCOC)
  - Legislators
  - Members of Council of Presidents

# Commission Training: Other

- Other trainings:
  - FOIA (2020)
  - State Ethics Commission Training (2022)
- Member of Association of Governing Boards (AGB)
  - 2023 Council of Board Chairs and Trustees Workshop
  - National training conferences
  - Other training materials and opportunities

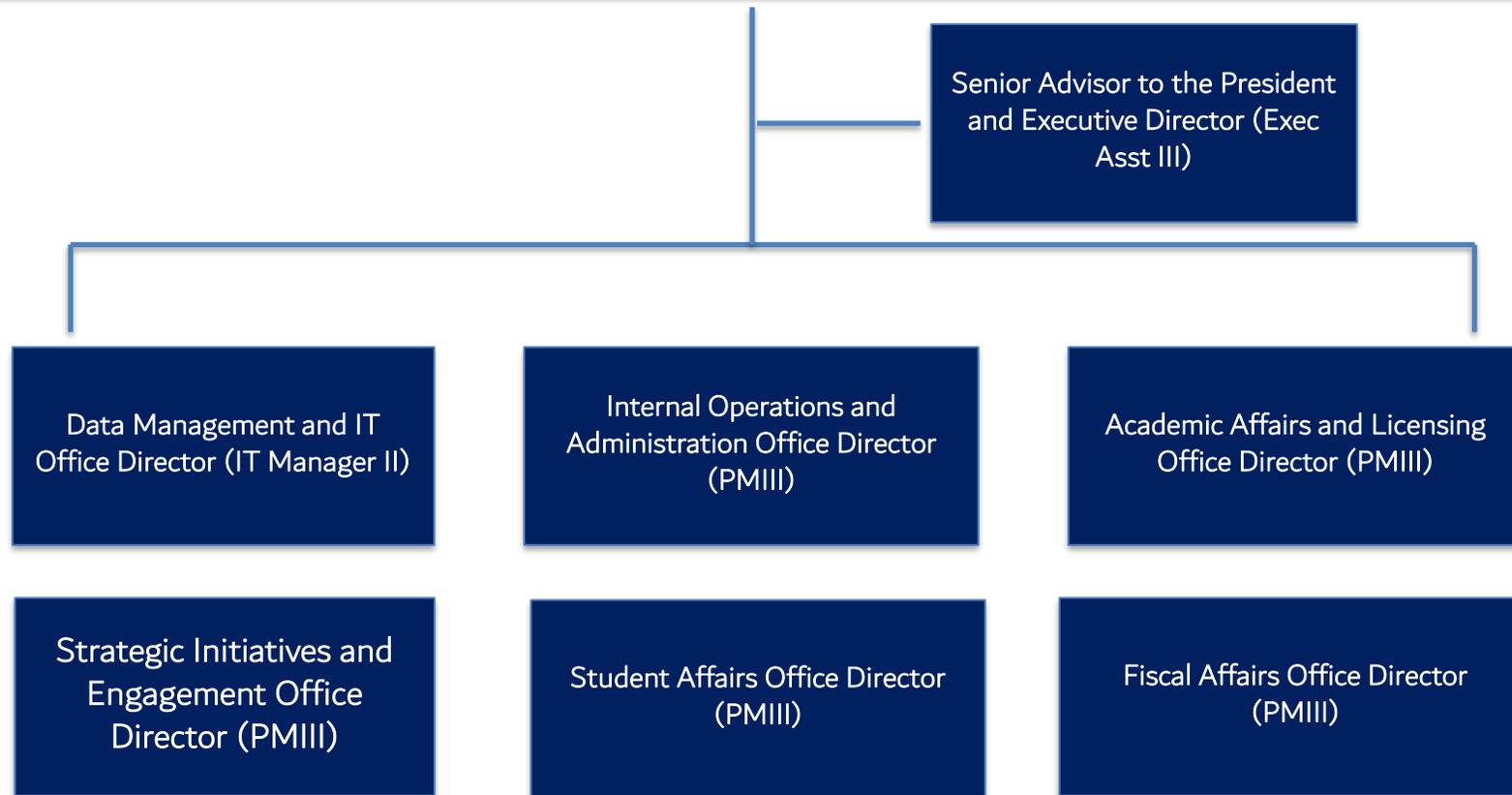
# Commission Evaluation of Agency Head

- Compliance process for Agency Head Salary Commission (AHSC):
  - June: PED completes self-assessment
  - July: Chair and PED discuss self-assessment
  - Late July: PED presents to the Executive Committee
  - August:
    - PED presents to full Commission in Executive Session
    - Commissioners complete individual PED performance surveys
    - Final packet (including self-assessment; survey results; narrative summary of performance and evaluation score) submitted to AHSC
  - September: PED and Chair complete planning document for upcoming year.

# Organizational Chart

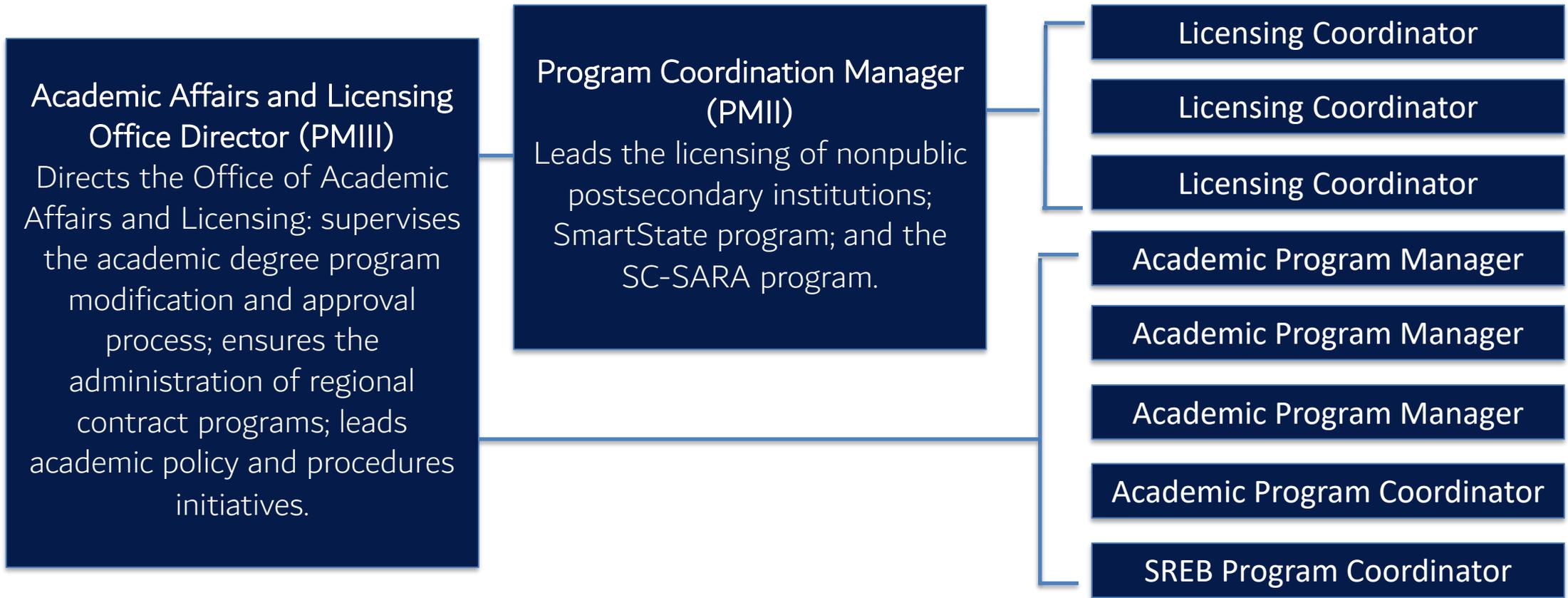
## President and Executive Director

Leads the agency; advises the Commission on all educational matters; recommends policies to the Commission and implements procedures; directs the overall operations of the agency; maintains a knowledgeable and professional staff; represents the Commission in groups, bodies, agencies and organizations.



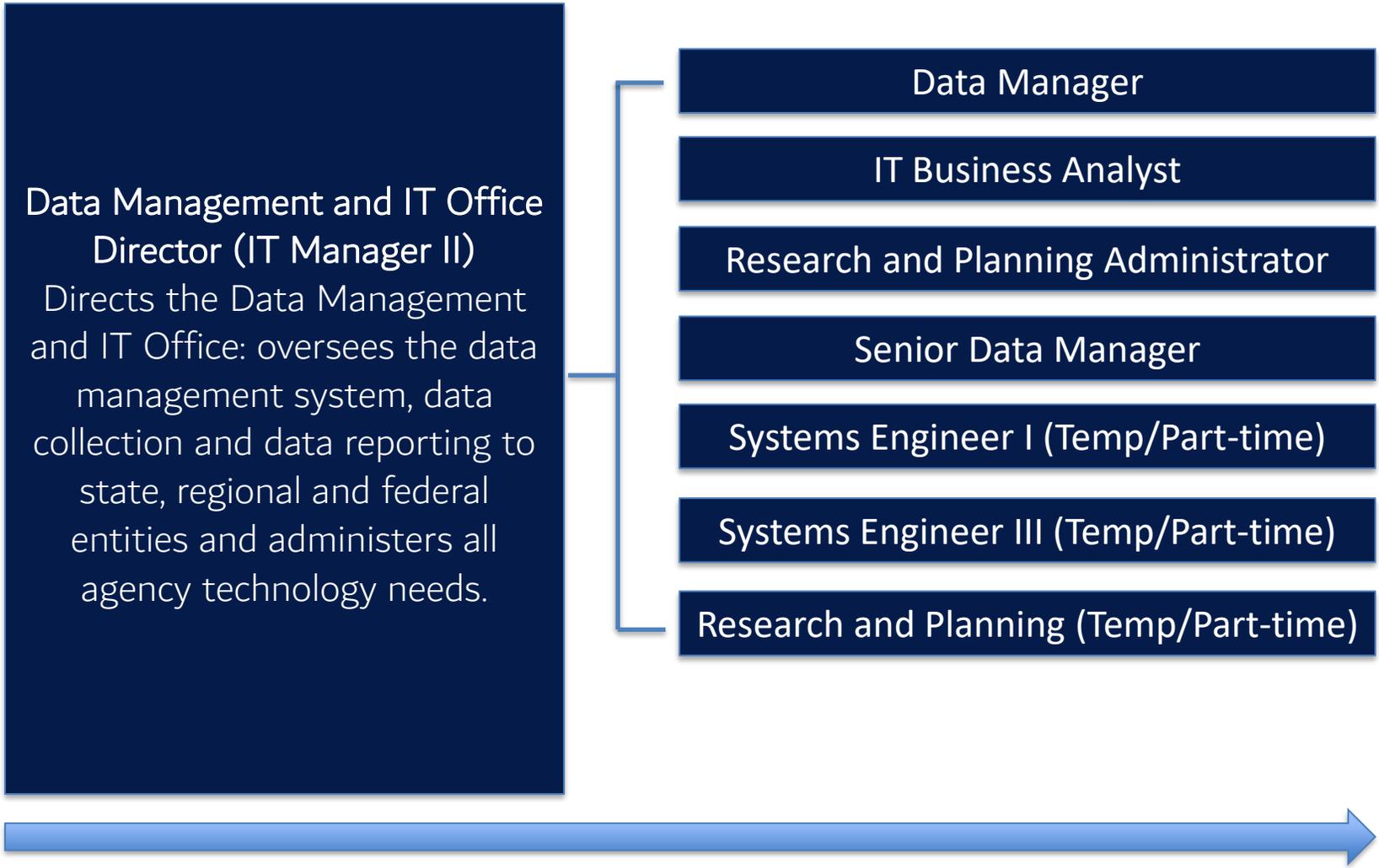


# Organizational Chart



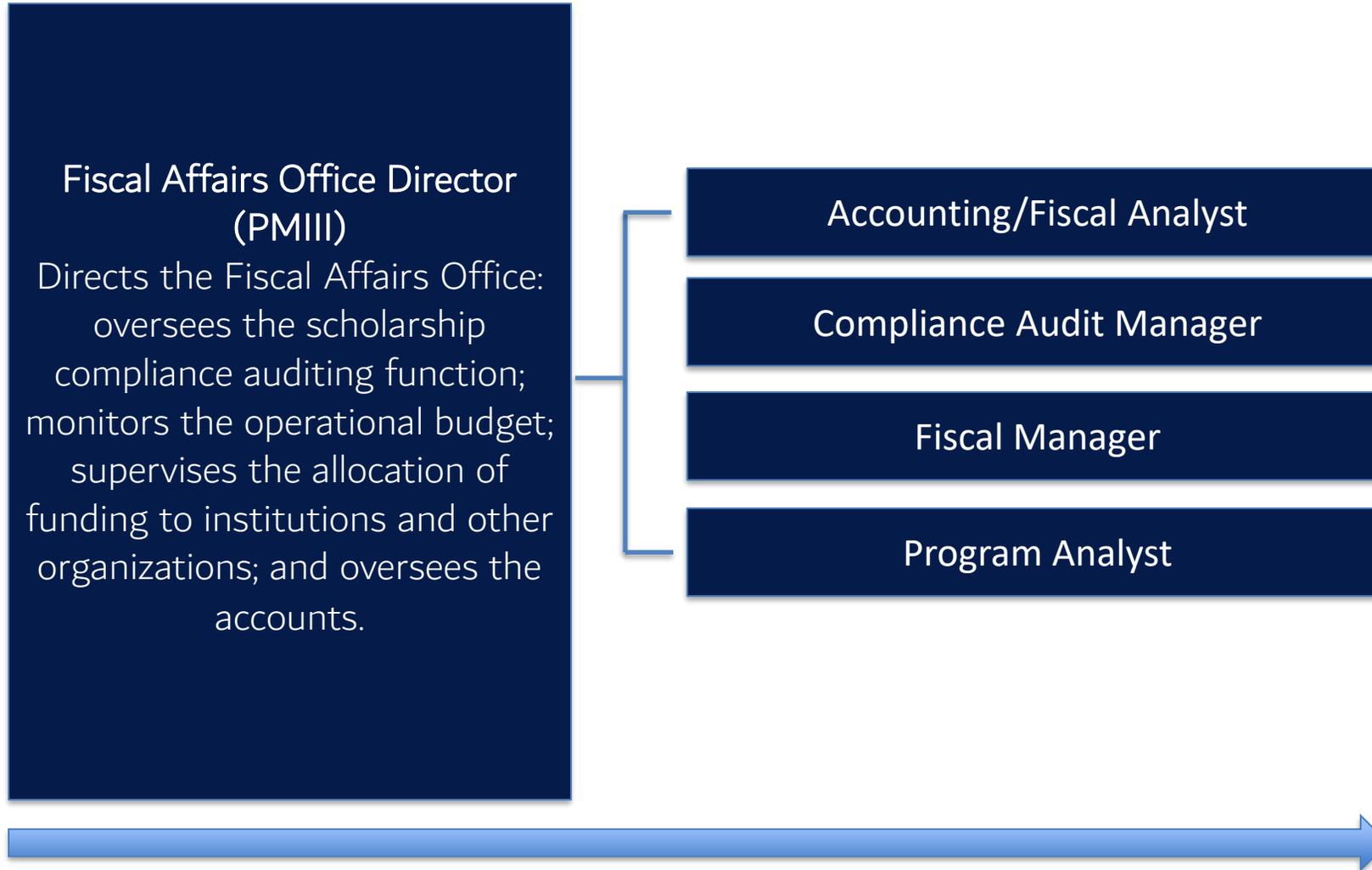


# Organizational Chart



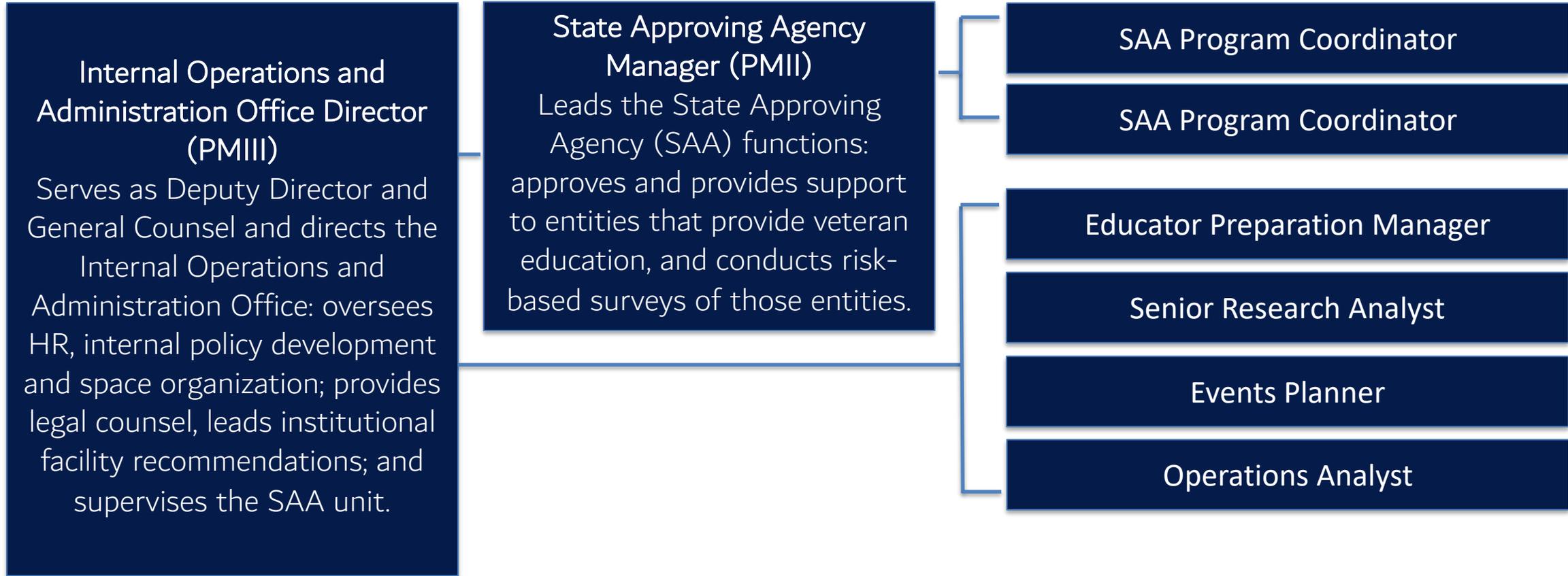


# Organizational Chart





# Organizational Chart





# Organizational Chart

Senior Advisor to the President  
and Executive Director  
(Exec Asst III)

Advises on policy and procedures; monitors progress of Ascend 60x30 initiatives; ensures agency's deliverables are complete and timely; drafts deliverables for the President and Executive Director.

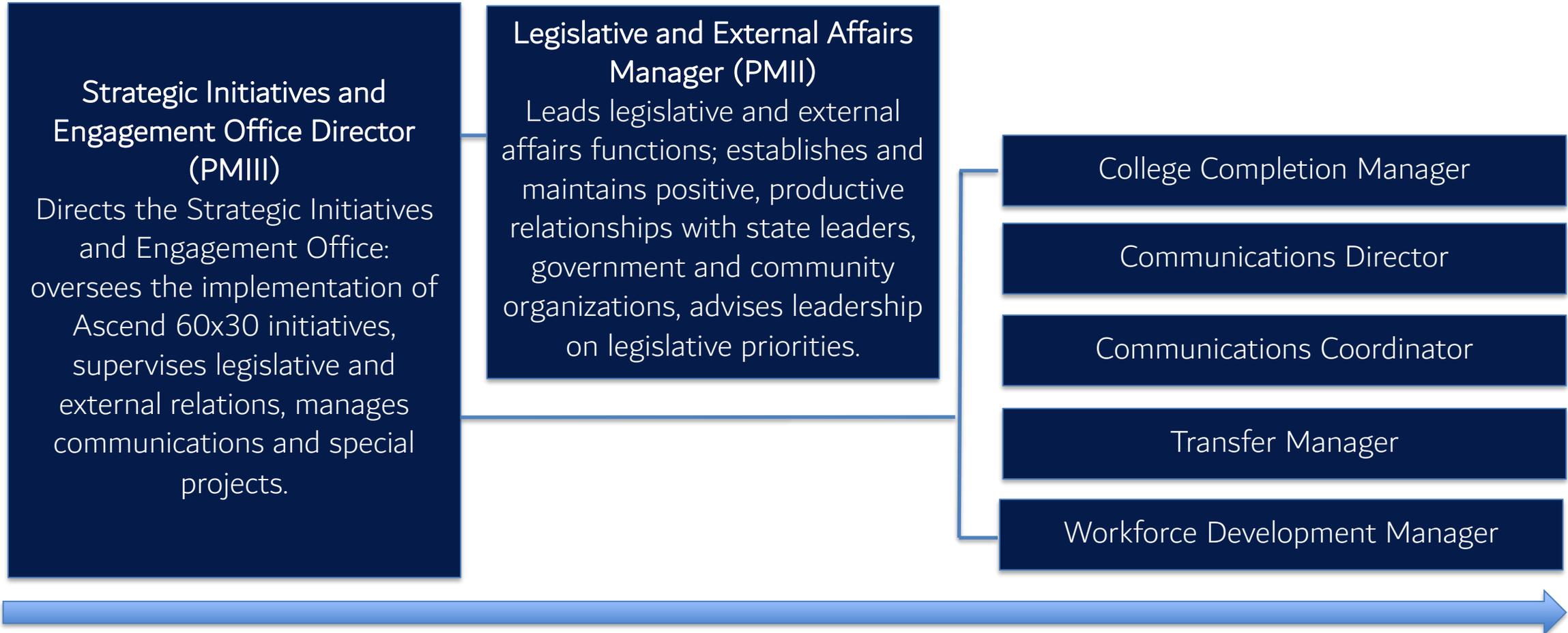
Administrative Assistant/Receptionist

Executive Assistant I



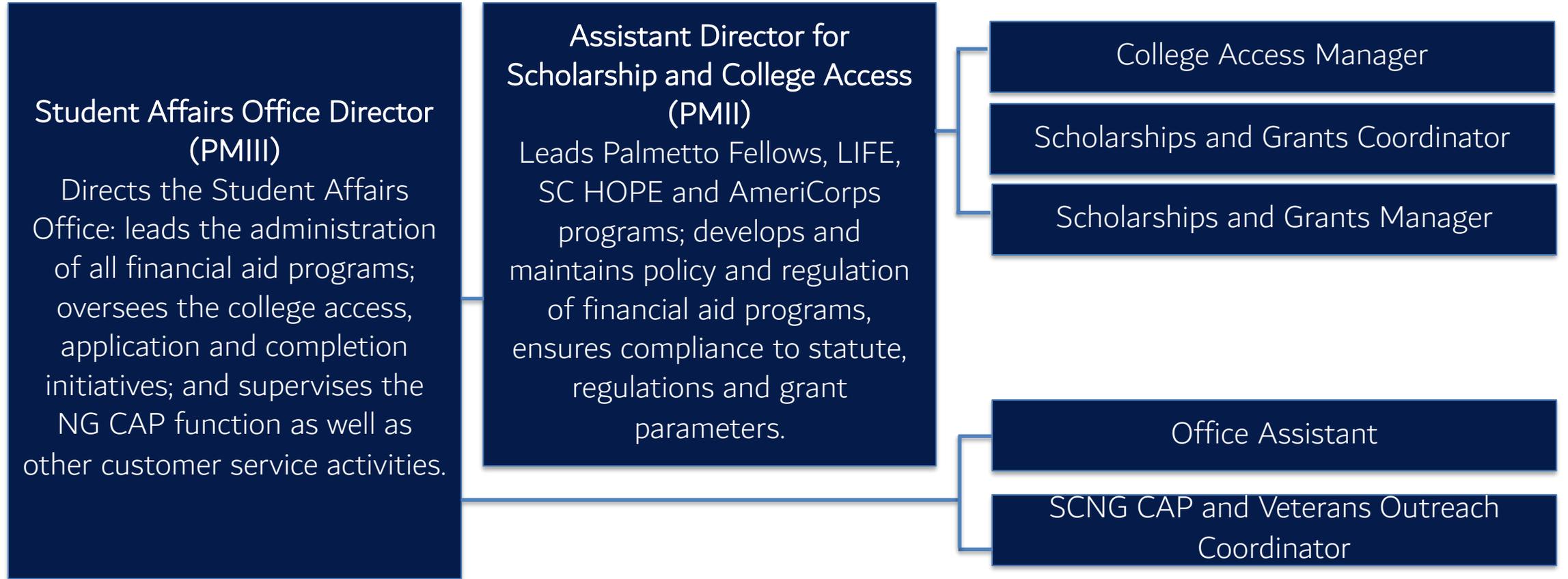


# Organizational Chart





# Organizational Chart



# Office Overview

- Office of Internal Operations and Administration
- Responsible for operations for the agency, including:
  - Human Resources
  - Procurement approvals agency-wide
  - Support
  - Legal service
  - State Approving Agency (regulatory support to Department of Veterans Affairs)
  - Services around teacher education and preparation

# Office Overview (continued)

- Office of Academic Affairs and Licensing
- Responsible for:
  - Academic program review and approval
  - Administration of interstate contract programs
  - Licensing of non-public institution operations
  - Grants program management
  - Research and innovation management
  - Academic policies development

# Office Overview (continued)

- Office of Student Affairs
- Responsible for:
  - Administrative oversight/coordination of state financial aid programs
    - Lottery Tuition Assistance
    - SC Need-Based Grant
    - SC HOPE
    - LIFE
    - Palmetto Fellows
    - SC National Guard College Assistance Program
  - Statewide scholarship/grant awards; statutory/regulatory compliance
  - Customer service and outreach to families about financial aid, promote value of higher education and postsecondary opportunities

# Office Overview (continued)

- Office of Fiscal Affairs
- Responsible for:
  - Manage agency's finances
  - Conduct scholarship compliance audits
  - Manage external grant funding
  - Administer lottery funding including scholarship funding to institutions

# Office Overview (continued)

- Office of Data Management and Information Technology
- Responsible for:
  - Higher education data (CHEMIS), and analysis using that data
  - Liaison between the Department of Administration Division of Technology Operations and CHE for the participation in shared computing services

# Office Overview (continued)

- Office of Strategic Initiatives and Engagement
- Responsible for:
  - Agency-level legislative and governmental relations
  - Agency-level communications
  - Initiatives and external engagements in support of agency strategic objectives (College Completion, Transfer Excellence, Educator Preparation Report Card, Workforce Development)

# Employee Overview: Types of employment

- Full-time employees (38)
- Temporary grant employees (3)
- Temporary employees (3)
- Related body temporary grant employees (10)
- Contractors (2)

*(Employee numbers current as of May 1, 2023)*

# Employee Overview: Retention

- Complexity of measuring employee retention at small agency
- Factors that affect retention at CHE:
  - Leadership turnover for almost a decade
  - Funding loss during Great Recession
  - Small agency; flat organizational structure
  - Limited funding for salary increases until FY 2022
- “Great Resignation”
- CHE comparable to other state agencies

# Employee Overview: Retention

- CHE steps to address retention:
  - Bonus policy
  - Staffing assessments
  - Salary increases
  - Telecommuting policy
  - Employee climate survey
  - Fun Committee

# Employee Overview: Training

- On-the-job training by supervisor and co-workers
- Agency Employee Handbook
- Standard operating procedures
- Supervisory training



# Appropriations - FY2023

## General Funds Recurring

### Administration

Administration	\$2,068,130
Employer Contributions	\$646,039
Licensing	\$47,972
<b>Total Administration</b>	<b>\$2,762,141</b>

### Scholarships/Grants

Education Endowment	\$24,000,000
SREB	\$6,585,183
<b>Total Scholarships/Grants</b>	<b>\$30,585,183</b>

### Other CHE Programs

Gear Up	\$177,201
EEDA	\$1,180,576
ASCEND 60 X 30	\$750,000
<b>Total Other CHE Programs</b>	<b>\$2,107,777</b>

### Flow-Through Funds

University Center of Greenville	\$1,084,899
Greenville Tech - Univ. Center	\$594,390
PASCAL - State Electronic Library	\$164,289
EPSCOR	\$1,279,330
Academic Endowment	\$160,592
African American Loan Program	\$119,300
SCSU School of Business	\$279,504
<b>Total Flow Through Funds</b>	<b>\$3,682,304</b>

**Total General Funds Appropriations:**  
**\$39,137,405**



# Appropriations - FY2023 Detailed, General Funds Nonrecurring

AmeriCorps Grant Match	\$240,000
University Center of Greenville	\$885,000
<b>Total General Funds Appropriations:</b>	<b>\$1,125,000</b>



# Appropriations - FY2023 Detailed, Other and Federal Funds

## EIA – Education Improvement

Allocated from Dept. of Ed. - Teacher Recruit Program	\$4,243,527
Allocated from Dept. of Ed. - Centers of Excellence	\$1,137,526
<b>Total EIA – Education Improvement:</b>	<b>\$5,381,053</b>

SmartState Program Administration **\$885,284**

College Goal Sunday **\$41,000**

## Operating Revenue

PASCAL - State Electronic Library	\$4,186,577
Licensing	\$356,327
<b>Total Operating Revenue:</b>	<b>\$4,542,904</b>

## Federal Funds

Gear Up	\$3,443,600
Improving Teacher Quality	\$876,879
State Approving Agency	\$409,353
AmeriCorps	\$160,000
<b>Total Federal Funds:</b>	<b>\$4,889,832</b>

## Education Lottery

LIFE Scholarships	\$235,150,272
HOPE Scholarships	\$10,904,039
Palmetto Fellows	\$72,139,864
Tuition Assistance	\$3,345,000
PASCAL – State Electronic Library	\$1,500,000
Carolina Clusters Grant	\$550,000
Transition Program	\$4,105,597
National Guard	\$6,200,000
Technology – Institutions	\$8,000,000
Higher Education Excellence Enhancement	\$11,250,000
Need Based Grants	\$70,000,000
Nursing Initiative	\$10,000,000
Institutes of Innovation	\$700,000

**Total Lottery** **\$433,844,772**



# Grant Collaboration

- Elementary and Secondary School Emergency Relief (SC Department of Education)
- Centers of (Teaching) Excellence; CERRA; SC-PRRMT (Education Improvement Act, EOC)
- College and Career Coaches (AmeriCorps)
- Project Pipeline Repair (SHEEO)
- Transfer Initiative (SHEEO/Gardner Institute)

# Records Retention and Report Compliance

- Compliance with general and agency-specific records retention schedules
- Long-term project to ensure all programs and initiatives have approved records retention schedules.
- Conversion of paper to digital records for select records series
- Development of records management policy



# Required Reports

- Abatements Report (Proviso 11.15)
- Accountability Report (Executive Budget Office)
- AmeriCorps Data Upload (Corporation for National and Community Service)
- Annual Report on the SC Program for the Recruitment and Retention of Minority Teachers (Education Oversight Committee)
- Annual Report on the Centers of (Teaching) Excellence (Education Oversight Committee)
- Annual Report on the Center for Educator Recruitment, Retention and Advancement (Education Oversight Committee)

# Required Reports (continued)

- Annual Report on the College Transition Scholarship (Proviso 3.5)
- Comprehensive Permanent Improvement Project Recommendations Report (2-47-40)
- Debt Collection Report (Proviso 117.33)
- Diverse Student Recruitment and Retention Report (Proviso 117.61)
- Fines and Fees Report (Proviso 117.73)
- Funds Report-Organizations Receiving State Appropriations (Proviso 117.21)
- Information Technology and Information Security Plans (Executive Budget Office)



# Required Reports (continued)

- IPEDS (Integrated Postsecondary Education Data System) Reports-Fall, Winter, Spring submissions (US Department of Education)
- Longitudinal Data Report (Proviso 11.17)
- Lottery Fund Expenditures Scholarship Audit and Adopted Procedures Report (Proviso 3.1)
- Minority Business Enterprise Utilization Plan (SMBCC Division)
- Minority Spending Quarterly Reports (SMBCC Division)
- Other Funds Survey (Executive Budget Office)
- Procurement Quarterly Reports (Procurement Office)

# Required Reports (continued)

- REACH Act Compliance Annual Report (59-29-130)
- Recycle Report (44-96-140(B))
- Reporting Packages, Various Financial (Comptroller General's Office)
- SC Institutes of Innovation and Information Report (Proviso 3.5)
- State Higher Education Executive Officers (SHEEO) Annual Financial Surveys (SHEEO)
- Single Audit Schedule of Federal Expenditures (Proviso 117.97)
- SmartState® Annual Report (2-75-10)

# Required Reports (continued)

- Southern Regional Education Board Data Submissions (SREB)
- State Approving Agency (SAA) Quarterly Reports (US Department of Veteran Affairs)
- Technology Fund Utilization Report (Proviso 3.5)
- Transfer Student Credit Policy Report (Proviso 117.138)

# Longstanding Informational Reports

- Academic Common Market Report
- Academic Degree Program Terminations and Approval Report
- Admission Standards for First-Time Entering Freshmen Report
- Associate Degree Evaluation Report
- College Application Month Report
- College Goal/FAFSA Completion Report
- College Transition Program Scholarship Annual Report
- Higher Education Statistical Abstract
- Licensing Activity Report

# Longstanding Informational Reports (continued)

- Need-based Grant Annual Report
- Palmetto Fellows Scholarship Annual Report
- Program Productivity Report
- SC National Guard College Assistance Program (SCNG CAP) Annual Report
- Scholarship Appeals Cycle Report
- Staff-Approved Mission Changes Report
- State Authorization Reciprocity Agreements (SARA) Activities Report

# Internal Audit

- The CHE does not have an internal audit function or position
- The State Auditor's Office conducts annual Agreed-Upon-Procedures (AUP) reviews
- SmartState Annual Audit
- Independent Procurement Audit (2018)



# Risk Mitigation

- Financial mitigation:
  - Procurement manual: outlines processes, procedures, and internal controls, modeled after the Department of Administration
  - Shared services agency: partner with the Department of Administration for Fiscal Services, their staff provide a layer of added security

# Risk Mitigation

- Technology mitigation:
  - Division of Technology Operations (DTO) agency: We follow the state's technology and security best practices as recommended or required by the DTO

# Risk Mitigation

- Human resources mitigation
  - Shared services agency
  - Policies and procedures: We require all staff to review and acknowledge receipt of agency HR policies
  - Staffing assessment: Beginning three years ago, Internal Operations leadership meet annually with office directors to discuss their division HR-related needs

# Agency Performance Measures

- Goal 1: Increase Higher Education Enrollment
  - Strategy 1: Assist families with planning for higher education costs
    - 1.1.1 Number of financial aid workshops held or attended by staff
    - 1.1.2 Number of events promoting scholarships and grants programs

# Agency Performance Measures (continued)

- Goal 1: Increase Higher Education Enrollment (continued)
  - Strategy 2: Increase family awareness of postsecondary education opportunities
    - 1.2.1 Number of participating families in College Goal Sunday
    - 1.2.2 Number of completed Free Application for Federal Student Aid (FAFSA) statewide

# Agency Performance Measures (continued)

- Goal 1: Increase Higher Education Enrollment (continued)
  - Strategy 3: Obtain grants targeting K-12 population to prepare them for postsecondary education
    - 1.3.1 Number of grants applied to that help prepare students for postsecondary education
    - 1.3.2 Number of grants managed that help prepare students for postsecondary education
    - 1.3.3 Number of students served by grants

# Agency Performance Measures (continued)

- Goal 2: Promote Quality and Excellence of South Carolina's Higher Education System
  - Strategy 1: Promote on-time degree completion
    - 2.1.1 Percentage of students earning an associate's degree in 2 years
    - 2.1.2 Percentage of students earning a baccalaureate degree in 4 years
    - 2.1.3 Percentage of South Carolina high school graduates attending South Carolina postsecondary institutions immediately after graduating high school

# Agency Performance Measures (continued)

- Goal 3: Improve Affordability and Accessibility of South Carolina Higher Education Programs and Services for Students and Families
  - Strategy 1: Promote high-quality early college opportunities
    - 3.1.1 Number of new dual-enrollment sites
    - 3.1.2 Number of visitors to SC Transfer and Articulation Center (SC TRAC) for dual enrollment, AP, IB, and transfer and articulation opportunities

# Agency Performance Measures (continued)

- Goal 3: Improve Affordability and Accessibility of South Carolina Higher Education Programs and Services for Students and Families (continued)
  - Strategy 2: Advance cost-saving opportunities to obtain a postsecondary credential
    - 3.2.1 Number of CHE-convened Council of Presidents' meetings to discuss and share best practices
    - 3.2.2 Number of Chief Financial Officer meetings to discuss and share best practices
    - 3.2.3 Number of Council of Board Chairs' meetings to discuss and share best practices

# Agency Performance Measures (continued)

- Goal 4: Promote Higher Education's Value to the State's Economic Growth and Human Capital Development
  - Strategy 1: Collaborate with peer agencies and institutions
    - 4.1.1 Number of data uploads to the Office of Revenue and Fiscal Affairs
    - 4.1.2 Number of reports produced from partnering with other agencies
    - 4.1.3 Number of presentations to outside agencies and the General Assembly about the value of higher education

# Agency Performance Measures (continued)

- Goal 4: Promote Higher Education's Value to the State's Economic Growth and Human Capital Development (continued)
  - Strategy 1: Collaborate with peer agencies and institutions (continued)
    - 4.1.4 Number of press releases promoting higher education
    - 4.1.5 Number of social media views related to the agency's promotion of higher education
    - 4.1.6 Number of social media posts promoting higher education
    - 4.1.7 Number of reports produced highlighting impacts of higher education

# Performance Measure Review Process

- CHE offices track performance measures throughout the year.
- CHE reports metrics annually in the agency's accountability report.
- CHE leadership reviews goals and objectives to ensure they represent the agency's mission and purpose.

# Agency Accomplishments 2018-2023

- FY2018 Public Agenda for Higher Education
- FY2018 Joined the Free Application for Federal Student Aid (FAFSA) Collective Impact Initiative
- FY2018 Palmetto Fellows Scholarship year-round application
- FY2018 Data Sharing agreement with the SC Revenue and Fiscal Affairs Office
- FY2018 Shared services agency with SC Department of Administration
- FY2020 Celebrated 10-year anniversary of College Application Month

# Agency Accomplishments 2018-2023

- FY2020-FY2021 Pandemic guidance for institutions
  - Bi-weekly meetings with presidents
  - Bi-weekly meetings with chief financial officers
  - Distributed Personal Protective Equipment funding
  - Hosted topical informational webinars
- FY2020 Successful migration of the agency's network to the Department of Administration Division of Technology Operations
- FY2020 Expanded eligibility for SC National Guard College Assistance Program



# Agency Accomplishments 2018-2023

- FY2020 Establishment of MOU with Fort Gordon on cybersecurity
- FY2020 Higher Education Action Committee
- FY2020 PASCAL Implementation of a single library service platform for 55 libraries
- FY2020-FY2023 Operations of the agency-foundational work to create policies, processes and procedures to guide HR, procurement, travel, employee training, technology
- FY2020-FY2023 Preliminary planning to migrate higher education data from antiquated system to new system
- FY2021 Reduction in space through office move, cost savings of approximately \$90,000/year



# Agency Accomplishments 2018-2023

- FY2021 Public Agenda Implementation Plan, *Ascend 60x30*
- FY2021 Development of strategic communications plan, new branding and agency style guide
- FY2021 Created bylaws for Council of Presidents leading to consistent meetings and leadership
- FY2021 Palmetto Fellows Scholarship allowed for two-year institution students
- FY2021-FY2022 Re-design of agency website
- FY2022 Joined Complete College America Alliance of States
- FY2022 Implementation of a state approved telecommuting plan to provide benefit to employees

# Agency Accomplishments 2018-2023

- FY2022 Implementation of REACH act compliance
- FY2022 College Transition Program Scholarship
- FY2022 Historical Funding of Higher Education in SC Proviso Report
- FY2022 Establishment of the Capital Renewal Needs Data Analysis and Compilation
- FY2022, FY2023 Administrative services for the SC Institutes of Innovation and Information
- FY2022-FY2023 Transfer Task Force; Transfer report; Transfer Convening
- FY2022, FY2023 Higher Education Day at the State House



# Agency Accomplishments 2018-2023

- FY2022, FY2023 College and Career Decision Day Rally
- FY2022, FY2023 PASCAL's Open Education Resources Initiative
- FY2023 Creation of the Office of Strategic Initiatives and Engagement and the Committee on Strategic Initiatives and Engagement
- FY2023 Nursing Initiative-faculty enhancement funding and scholarship
- FY2023 MOU with Taiwan for strengthening education and learning-related connections between Taiwan and SC

# Agency Accomplishments 2018-2023

- FY2023 Statewide Military Credit Mobility for SC Servicemembers Taskforce
- FY2023 Hosted legislator breakfast to inform and engage stakeholders
- FY2023 Oversight of the SC Educator Preparation Report Card
- FY2023 Implementation of doctoral/professional university classification study
- FY2023 Joined the Post-Secondary Employment Outcomes study with the US Census Bureau

# **Related Body: PASCAL**

(South Carolina's Virtual Academic Library)

PASCAL is the Partnership Among SC Academic Libraries:

- 21st year of operation; 57 members
- CHE, a founding partner and fiscal agent
- Supported by member fees & state funds
- Governance: 11 library director board

# PASCAL Connects

PASCAL's mission-critical technology connects the state's 230,000 students to knowledge

## Technology

- A common Discovery interface & authentication tool
- A unified library management platform

## Resources

- Universal Access
  - Over 17,000 journals
  - 300,000 ebooks;
  - Millions of books and articles held by individual libraries

# PASCAL Statewide Efficiencies

PASCAL's highly cost-effective programs help libraries provide more for their students and faculty while saving money:

- Over \$19.4 million in cost avoidance in FY21-22
- Since 2004, over \$180 million in cost-avoidance
- Overall systems costs reduced by 19 percent

# CHE-PASCAL Memorandum of Understanding

- CHE supports library collaboration, and assisted in the creation and development of PASCAL, based on the CHE's statutory mandate to encourage collaboration through the development of joint programs (Section 59-104-260).
- Memorandum of Understanding (reviewed and updated annually)  
CHE provides:
  - Human resource support
  - State-agency procurement for purchasing and licensing authority
  - Access to legal counsel;
  - Management of receivables and payments;
  - Financial reporting;
  - Office space and infrastructure.



# PASCAL Membership & Board

## Membership:

- All members have voting rights at general membership meetings
- Members approve fees on an annual basis)
- Ex officio membership: CHE, SCICU, SC State Library

Board of Directors: Eleven elected members (seven from public institutions; four from independent institutions)

- Preparation of budget
- Fee proposal
- Establishment of committees
- Oversight of programs and Executive Director



# Related Body: SC Institutes of Innovation and Information (SCIII)

- Promote partnerships between HBCUs and state business and industry, improve the state's workforce and lift the state economy
- CHE responsibility (Proviso 11.21)
- Actions:
  - Board formation
  - Board bylaws development
  - Executive Director hired
  - MOU between SCIII and CHE signed

# Related Body : SC Institutes of Innovation and Information (SCIII) Board

- No less than three and no more than 11 voting members
- Two ex-officio non-voting members:
  - CHE representative
  - SCIII institutional director
- Six current members

# Questions?

